

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: February 2020/2019 Report – Self-Catering

1.0 Introduction February 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy report covering February 2020 and benchmarking against February 2019. The survey reviews Accommodation performance throughout Scotland, highlighting trends across various sectors and categories of the industry. This report offers a snapshot of accommodation performance based on participating providers. Comments and feedback should be directed to Marina Martinolli (Tel: 0141 331 8400 or via E-mail: mma4@gcu.ac.uk).

2.0 Executive Summary February 2020

Self-Catering Unit Occupancy rates for the month of February 2020 witnessed a decrease of -6.32% when comparing occupancy rates with February 2019. The occupancy rates for February declined from previous months, whilst at the same time maintaining similar occupancy rates to 2019. During the month of February, a traditionally quiet time across all accommodation sectors, the initial impacts of COVID-19 were being experienced as the overseas visitor market contracted. Kingdom of Fife performed best during this time when comparing occupancy rates in 2020 with 2019. The visitor attraction sector saw a decrease of 8% in visits numbers when comparing February 2020 with February 2019.

3.0 Self-Catering

3.1 Performance by Self-Catering Category – February 2020/2019

In the **Self-Catering sector**, the unit occupancy rate for the period February 2020 was **28.82%** when compared to data from the previous year of **35.14%** occupancy rate; this shows a decrease of **-6.32%**.

Unit occupancy rates in the Ayrshire & Arran region was the highest in February 2020. Chalet and Lodges, those located in Other Urban Areas, Island properties and those charging a £299 or under weekly tariff experienced the highest percentage unit occupancy rates during February 2020.

Unit Occupancy – February 2020/2019

Unit Occupancy	Feb 20	Feb 19	% Change	Jan-Feb 20	Jan-Feb 19	% Change
Self-Catering	28.82%	35.14%	-6.32%	26.25%	33.56%	-7.31%

Unit Occupancy by Former VisitScotland Area – February 2020/2019

Area	Feb 20	Feb 19	% Change	Jan-Feb 20	Jan-Feb 19	% Change
Aberdeen & Grampian	29.77%	33.03%	-3.26%	26.10%	29.02%	-2.92%
ALLFV	24.13%	50.21%	-26.08%	25.52%	46.27%	-20.75%
Angus & City of Dundee	40.37%	57.21%	-16.84%	21.85%	48.06%	-26.21%
Ayrshire & Arran	51.40%	36.00%	15.40%	51.46%	38.01%	13.45%
Dumfries & Galloway	9.93%	16.91%	-6.98%	8.85%	25.21%	-16.36%
Edinburgh & Lothian	20.67%	21.54%	-0.87%	20.19%	18.54%	1.65%
Greater Glasgow	39.04%	30.30%	8.74%	35.23%	29.52%	5.71%
Highlands of Scotland	33.24%	36.37%	-3.13%	32.74%	34.84%	-2.10%
Kingdom of Fife	49.14%	25.01%	24.13%	30.19%	27.13%	3.06%
Orkney	28.75%	6.44%	22.31%	16.39%	8.13%	8.26%
Perthshire	34.80%	33.56%	1.24%	26.37%	28.04%	-1.67%
Scottish Borders	32.66%	38.92%	-6.26%	30.13%	29.05%	1.08%
Shetland Islands	0.00%	0.00%	0.00%	2.50%	0.00%	2.50%
Outer Hebrides	6.90%	9.82%	-2.92%	9.47%	10.68%	-1.21%

Unit Occupancy by Location (Accessibility & Density) – February 2020/2019

Location accessibility/density	Feb 20	Feb 19	% Change	Jan-Feb 20	Jan-Feb 19	% Change
Large Urban Areas	32.74%	26.46%	6.28%	27.87%	22.19%	5.68%
Other Urban Areas	36.74%	32.39%	4.35%	28.83%	35.24%	-6.41%
Accessible Small Towns	13.55%	26.96%	-13.41%	11.81%	24.36%	-12.55%
Remote Small Towns	23.47%	26.75%	-3.28%	21.99%	30.08%	-8.09%
Accessible Rural	32.65%	54.16%	-21.51%	30.87%	50.54%	-19.67%
Remote Rural	29.85%	29.95%	-0.10%	28.65%	29.92%	-1.27%

Unit Occupancy by Location (Geographic) – February 2020/2019

Location (Geographic)	Feb 20	Feb 19	% Change	Jan-Feb 20	Jan-Feb 19	% Change
Coastal	21.68%	19.09%	2.59%	16.66%	23.14%	-6.48%
Inland	29.88%	41.15%	-11.27%	28.23%	38.19%	-9.96%
Islands	37.56%	29.95%	7.61%	36.50%	32.49%	4.01%

Unit Occupancy by Property Type – February 2020/2019

Property Type	Feb 20	Feb 19	% Change	Jan-Feb 20	Jan-Feb 19	% Change
Glamping inc Yurts etc	3.33%	14.15%	-10.82%	5.89%	13.93%	-8.04%
Lodge/Chalet	54.68%	67.23%	-12.55%	49.58%	61.71%	-12.13%
Cottage	25.20%	22.68%	2.52%	22.52%	24.68%	-2.16%
Bungalow	35.81%	42.05%	-6.24%	33.40%	45.99%	-12.59%
House	9.86%	17.64%	-7.78%	9.66%	19.57%	-9.91%
Flat	29.26%	20.60%	8.66%	24.32%	19.17%	5.15%
Static Caravan	10.24%	24.35%	-14.11%	7.78%	23.80%	-16.02%
Other Property	13.56%	23.76%	-10.20%	12.79%	10.73%	2.06%

Unit Occupancy by Tariff – February 2020/2019

Weekly Tariff	Feb 20	Feb 19	% Change	Jan-Feb 20	Jan-Feb 19	% Change
Unknown	4.10%	3.81%	0.29%	3.69%	3.28%	0.41%
Under £299	46.54%	33.60%	12.94%	31.92%	25.63%	6.29%
£300 - £499	23.71%	26.78%	-3.07%	20.32%	27.14%	-6.82%
£500 - £799	24.68%	27.04%	-2.36%	23.15%	27.25%	-4.10%
£800 or more	40.41%	48.51%	-8.10%	38.31%	46.82%	-8.51%

Uni Occupancy by Location Type – February 2020/2019

Location Type	Feb 20	Feb 19	% Change	Jan-Feb 20	Jan-Feb 19	% Change
Seaside - Coastal	31.32%	43.99%	-12.67%	31.33%	42.44%	-11.11%
City – Large Town	33.64%	33.21%	0.43%	30.09%	26.67%	3.42%
Small Town	18.98%	21.60%	-2.62%	12.98%	24.51%	-11.53%
Countryside - Village	27.96%	31.36%	-3.40%	24.58%	29.76%	-5.18%